INDEX

1 Methodology handbook: a practical approach to SIP
1.1 Preparation
1.2 Prompts
1.3 Ideation
1.4 Proptotyping
1.5 Sustaining
1.6 Scaling
1.7 Systemic change
1.8 Resources
1.9 Bibliography
Methodology handbook: a practical approach to SIP

This SOCRATIC Methodology Handbook provides a set of practical guidelines for each step of the SOCRATIC Methodology. The handbook targets users are the contributors to the social innovation process (SIP) on the SOCRATIC platform. These contributors are expected to have different levels of experience from social innovation. Therefore the Handbook provides an easy-to-understand approach to Social Innovation Process (SIP). Its main purpose is to educate newcomers to contribute to social innovation using SOCRATIC. Highlighting main concerns and recommending tools, it will also support contributors with more experience.

A more detailed description of the Methodology can be found in the SOCRATIC project deliverable D2.2 SOCRATIC Methodology Workbook. That document describes as well the process for defining the methodology, provides a full list of references used to build the methodology and discusses observations regarding the methodology in relation to the assessments that occurred at the end of the SOCRATIC project.

SOCIAL INNOVATION AND SOCRATIC

Social Innovation is about getting together to solve societal problems. It is about addressing the root of such problems with solutions that will trigger positive social shifts. It is about solving the problem together with others, in an inclusive manner.

SOCRATIC is a collaborative platform for designing and bringing to life solutions to social challenges. SOCRATIC connects people together for describing and discussing challenges, generating ideas, implementing those ideas and help them scale, positively impact society and change the world.
1.1 Preparation

For those who want to help solving social challenges:

- **Would you like to learn more about Social Innovation and contribute to projects for social good?**

This is the place for you to be! Browse through the contents to learn about what social innovation. Do you find social innovation interesting and wish to jump into action? Join an Innovation Space, follow the guidelines that help you to become a contributor, and take part in the Social Innovation Adventure!

- **Do you represent a public or private organization that wishes to facilitate social innovation processes?**

This is the place for you to be! Using SOCRATIC you will be able to establish an Innovation Space to solve social challenges your organization deals with. You will be able to launch challenges and to work together with people who wish to contribute in finding and developing innovative solutions. Using SOCRATIC, you can create your own ecosystem, recruit contributors and learn from working with them!

**Define your Innovation Space**

The **Innovation Space** sets up the foundations for the challenges that will be identified and the solutions that will be proposed. You should transmit your vision and your values in a clear and precise way in order to ensure that the members in the Innovation Space adhere to your principles. The Innovation Space will guide the actions undertaken by the members.
Define your Innovation Space

**Who are you?** Explain the domain or theme for the social challenges you are targeting. For example, are you focusing on a specific UN sustainability goal? Explain your way of working. For example, do you wish to play a major role in all innovation processes that take place within your space?

**Which goals do you wish to reach?** Present the goals you wish to achieve in your space. For example, how many new participants would you like to attract to your space in the coming year? How many new challenges would you like to be proposed? Defining goals will allow you and the member of the Innovation Space to set focus on the most important activities in the space. The goals can be revised afterwards.

**Your role as coordinator of an innovation** is not to control the members and their activities, but rather to facilitate the work and to motivate contributors. Bring members into action, create activities and promote both physical and virtual meetings! Face to Face meetings strengthen relationships and build foundations for trust. You are free to launch any initiative that can help building a strong community of your Innovation Space!

**Do not forget that the members in your space are creative.** Invite them to propose ideas to enhance your space and give recognition for their participation. Conflicts may occur within communities. As a coordinator, you should try to identifying the causes and solving these conflicts in a conciliating manner. Try being supportive and understanding towards all sides.

**The coordination role is very important for the Innovation Space success** but can be very demanding. When starting your Innovation Space, focus on few challenges. That will help you to assess amount of coordination effort needed and allow you to plan the Innovation Space growth accordingly.

As the Innovation Space grows, you may want to share coordination tasks with other trusted people. You may also recruit active and trusted members to become ambassadors for the innovation space.

**Do you have in mind colleagues, friends, experts that should join your Innovation Space?**

Use the SOCRATIC platform to reach out to people that can contribute to your Innovation Space.

Think wide! There are plenty of knowledge out there. Leave your comfort zone, invite those with different expertise!
Define your Innovation Space

• Do you have in mind colleagues, friends, experts that should join your Innovation Space?

Use the SOCRATIC platform to reach out to people that can contribute to your Innovation Space.

Think wide! There are plenty of knowledge out there. Leave your comfort zone, invite those with different expertise!

Did you consider all beneficiaries that should be interested by the theme addressed in your space? What about their representatives?

Did you invite thinkers? What about doers?

Defy all potential contributors by launching a couple of challenges in your Innovation Space.

• Inspire the members of your Innovation Space through success stories

We all love stories. Stories inspire and motivate people to act. Make use of success stories that illustrate different aspects of the social innovation. How did the initiative start? How did it grow? How did it get funding?

Success stories can guide the members of your Innovation Space. By demonstrating the process in practice, they make the understanding of guidelines and tools more tangible.

Is your Innovation Space newly established? Refer to success stories out there or from other Innovation Spaces. As soon as initiatives in your own Innovation Space become successful, use them as reference points. The closer to the context of your Innovation Space a success story is, the more relevant it is.
1.2 Prompts

Observing the world around you, you notice that some people are having a hard time dealing with life situations and social injustices. You realize that there are many aspects of the society which could be made sustainable and inclusive. You wish to help solving these social challenges!

Do you understand well the root of the social problem your challenge seek to solve? Social injustices are often complex. Try to formulate the challenge and analyse the context in which it takes place. Invite other people, with different backgrounds and experiences, to help you fully understand and describe the challenge. Don’t rush into the ideation, a good understanding of the the problem your challenge represents will later on help narrowing down ideas that effectively solve it.

**SOCRATIC** supports you! You will find guidelines and tools that help you to understand the problem and describe the challenge in this workbook.

**SOCRATIC** also helps you to engage the whole SOCRATIC community to give you feedback and support you! When you have, together with other people, describe the challenge in a way you are all happy with, publish it and ask the community to bring in some ideas to resolve it.

---

**Define your Challenge**

The challenge you have in mind is complex, therefore, it’s important to make it more concrete. Start by organizing your thoughts. Explore and think about the roots of the challenge, the problem that’s behind it, and identify the beneficiaries. The SOCRATIC challenge template can help you structure your thoughts.

- *Do you have in mind some friends, experts, beneficiaries that can help you to define and refine your challenge?*

The viewpoints from different people will permit you to broaden your understanding of the challenge. Societal problems are usually complex. Therefore it is important to collect information from different actors. Use SOCRATIC to reach out to actors that can help you understanding and defining the challenge. You can ask them to contribute with comments, documents and videos. SOCRATIC also suggests tools to stimulate the discussion.

You are also encouraged to meet contributors in real life and bring back your findings to the SOCRATIC community.

You have plenty of tools that can be used to gather experiences and information to better understand the challenge. Have a look at them and chose the one you feel more comfortable with.
Tools that can help you to define your challenge

A day in the life of: A good way to start thinking about the problems encountered by the beneficiaries of your challenge, is by drawing a day in their life. Think about the different activities the beneficiaries carry out during a whole day. What do they do? How do they do it? Why? Are there other people involved? Answering these questions will help you to understand your beneficiaries.

“A day in the life of” is a tool that can help you to prepare for using other tools such as Shadowing and Interviews.

Shadowing: Put on the lenses of your beneficiaries. Do you see what they see? Observe the beneficiaries in their living/working context. Do not hesitate to ask them some questions -if you have the possibility-.

Prepare your lenses: Define which information you want to gather. Who can provide it? Where can you find it?

Prepare the field: What do you need to observe? Where will you be able to observe it?

What did I see? What does it mean?: Synthesize all the gathered information. Use it as insight for the development of a useful idea.

You can download the People Shadowing template for collecting information from http://diytoolkit.org/tools/shadowing-2/

Interviews: Get closer to the beneficiaries and let them explain their burdens or needs. It is useful to ask open questions that drive them to reflection and help them to express and share their needs. Here are a few steps to help you run interviews:

Prepare your immersion: Identify the themes and prepare the questions that you want to address with the beneficiaries. Organize them and structure your objectives.

Select the best environment for your immersion: Prepare the interview well: What topics do you wish to learn about? What beneficiaries can best give you information on these topics? How can you reach out these beneficiaries?

Should you can organise individual interviews or group interviews? Individual interviews suit better personal or sensitive topics. The beneficiary is not influenced by other beneficiaries. Group interviews can help engaging participants and create opportunities for debate and resolution. Do not mix persons with authority or power with other persons.
Tools that can help you to define your challenge

Dive: Select a nice spot, neutral and comfortable where you are sure that the beneficiary will be able to express her-himself freely. Let the beneficiary speak and listen. Take notes. Make an audio recording, if the beneficiary is willing so. Be aware of gestures that reflect the emotional state of the person.

Decode a sea of words: What to do with all collected information? Listen to the recording, if any, and transcribe it. Go back to your initial topics and questions and try to identify the answer to them. Highlight terms and issues that are often mentioned. Underline quotes representative of the transmitted message. Use all this to generate insights for the development of a useful idea.

Post-it session: If you have the possibility to meet other contributors physically, post-it stickers are a very nice tool that enable meeting participants to express their viewpoints. Post-it stickers can be grouped the post-its in order to organize and connect ideas. Start mapping out the daily context, challenges and motivations.

Experience tour: It is time to organize your findings and set priorities. Experience tour is a tool that help you to structure your insights and reflect upon them. See http://diytoolkit.org/tools/experience-tour-2/

Acknowledge and motivate participants

Follow-up comments to the challenge and give feedback to the contributors. Acknowledgment and close collaboration are essential for keeping contributors engaged and interested in further participation in the next steps of the social innovation process. Identify the most engaged contributors. They are your ambassadors. They can help you to disseminate the initiative and recruit new contributors.

As you gather more information, refine your challenge to reflect its understanding. Keep the challenge description clear and attractive in order to receive as many ideas as possible!

You can edit your challenge as often as you want in order to achieve a precise description. You should keep it updated reflecting the information gathered through field work and other comments to your challenge. Retrieve your challenge from your profile under “My Challenges”. Watch out because once you close the challenge definition step and start the ideation step, you will not be able to carry out changes!
1.3 ideation

Start responding to the launched challenges! Do you have ideas for solving challenges? Describe them and discuss them with other SOCRATIC users. Do you have feedback to ideas to solutions proposed by other SOCRATIC users? Add comments to the proposed ideas. All ideas will benefit from the different perspectives from several SOCRATIC users.

Define your Challenge

You get this brilliant idea to respond to the challenge. First, organize your thoughts with the support of the idea template. Think of who the beneficiaries are and which impact your idea will have on them.

It is also important to start thinking about the business aspects already now. The earlier you think about it, the more chance you have to focus your efforts on an idea that is feasible. Have a look on the tools you can use to generate and analyse the idea potential.

Tools for the ideation phase

**Brainstorming:** If you have the opportunity to generate ideas with a group of people in a physical setting before sharing it in SOCRATIC, you may want to run a brainstorming session. Check the Design Kit guidelines about brainstorm rules in order to make the most out of it:

See [http://www.designkit.org/methods/28](http://www.designkit.org/methods/28)

**Fast idea generator:** Some ideas simply come out of the blue, like when taking a shower. If you haven't come up with an idea, you may use tools for generating ideas. The Fast Idea Generator encourages you to think about a problem from different perspectives. It works best when applied in a group.


**Thinking hats:** Look at the idea from different viewpoints. Thinking hats is a tool for discussing a topic in group. Give the group members different hats and let them look at the idea in different roles.

**Tools for the ideation phase**

**Stakeholder map:** Think of all actors that are affected by your idea. Your stakeholders. Often we tend only to think about the direct beneficiaries, however there are many other actors involved on your solution. Who has interest of it being successful, or unsuccessful? Who can contribute to it? Who will have power or influence on it?

**Identify your stakeholders:** Think about the context of the main beneficiaries for your idea. Which other actors are involved in their daily life in relation to the social need you wish to address? What about the family, public or private institutions, neighbours, politicians? What is their role? How does your idea fit their needs?.

*Look at the context with eyes wide open!*

**Organize your stakeholders:** Some may benefit from the idea, but have not much influence. Some can contribute and also have influence. How should you involve them for bringing forward your idea? Place them of the Power/Interest grid and define a strategy adapted to their power and interest. Focus on engaging interested stakeholders with power, but do not forget to keep all people with power satisfied, and all interested people informed.

**Identify the relations between the stakeholders:** How can you exploit these relations? Can you piggyback on existing collaborations? Should you establish new collaborations? What form of collaboration is useful?

---

**Stakeholder Map: Who Needs What?**

<table>
<thead>
<tr>
<th>Influence of Stakeholder</th>
<th>Interest of Stakeholder</th>
</tr>
</thead>
<tbody>
<tr>
<td>+</td>
<td>+</td>
</tr>
<tr>
<td><strong>Anticipate and meet needs</strong></td>
<td><strong>Manage most thoroughly</strong></td>
</tr>
<tr>
<td><strong>Anticipate and meet needs</strong></td>
<td><strong>Manage most thoroughly</strong></td>
</tr>
<tr>
<td><strong>Regular minimal contact</strong></td>
<td><strong>Manage most thoroughly</strong></td>
</tr>
<tr>
<td><strong>Keep completely informed</strong></td>
<td><strong>Manage most thoroughly</strong></td>
</tr>
</tbody>
</table>

[Diagram showing stakeholder map with categories of influence and interest]
Tools for the ideation phase

**Business Model Canvas:** The successful implementation of an idea depends on understanding the business context and exploiting business opportunities. At the beginning, it may be possible to start a project without external financing, but for it to be sustained, one needs develop revenue streams to finance the innovation.

The business model canvas is a template for organizing different business elements, such as customers, value propositions, key partners and finances. It helps you assess your idea’s potential of securing financing to cover the innovation costs and development. You may not be able to provide all information in the beginning, but is good to start early and to refine the model iteratively as the idea and solution get mature. You can start making a first draft, but later on you should work together with your stakeholders to refine the model.

Start thinking about your potential key partners and the key activities needed to develop your idea. Who are your potential customers? Think beyond the beneficiaries. Who may buy the products you are developing? For example, any public or private service institution? What is the value that you create for the main beneficiaries and other stakeholders that can benefit from your idea? How can you guarantee funds to operate and thrive? What are your competitors and suppliers?

Download the business model canvas from https://strategyzer.com/canvas/business-model-canvas
Tools for the ideation phase

**Elevator Pitch:** A good way to make your idea clear is to present it to somebody else. Focus on the core of your idea and highlight the value of the idea. How can you catch the attention of your auditor? How can you make your auditor remember the idea? Make your elevator pitch!

Why “elevator pitch”? It should be possible to present the idea in the time span of an elevator ride. Approximately thirty seconds to two minutes. If you manage to capture attention inside the elevator, then the auditor will go on discussing the idea with you after the ride.

**Can the beneficiaries help you to refine and present your idea?**

Getting insights from the beneficiaries is important to ensure the success of your idea. You have plenty of tools that can be used to gather experiences and information. **Have a look at them and chose the one you feel more comfortable with:**

**Shadowing:** See description under the Prompts step. The focus of shadowing under ideation is to understand the context of the beneficiaries in order to develop relevant ideas to solve their problems.

**Interviews:** See description under the Prompts step. The focus of interviews under ideation is to understand the context of the beneficiaries in order to develop relevant ideas, or to understand how potential ideas would fit in the context of the beneficiaries.

**Questionnaires:** While interviews provide deep insights for few beneficiaries, questionnaires allow to get feedback from a large number of beneficiaries. Questionnaires are useful for gathering opinions from many. They allow to collect specific information without much explanation, and, therefore, are well suited to complement interviews (not replace them).

**Prepare your immersion:** Which information do you want to gather? Who are your respondents? Are they representative of the beneficiaries you wish to solve a challenge for?

**Define the questions:** Questions should be clear, precise and easy-to-understand. Test your questions with a few persons before sending the questionnaire to your respondents.

**Analyse the results:** Analyse the answers, question by question. Summarize the answers given by each beneficiaries to all of them. Which are the common answers? Which are divergent? Are these differences due to differences in age, gender, location or any other factor? Once all the information has been analysed, synthesize the results. Use this as insight for the development of a useful idea.
Recruit creators and solvers with tech insights to refine your idea

**SOCRATIC** provides management tools in order to search for SOCRATIC users that can help you. If you have someone in mind in your network who is not registered yet, you can invite them to take part in this step of the innovation process. Ask them to comment your idea and contribute with documents and videos to the idea.

In order to facilitate the discussion, you can make use of collaborative documentation tools such as Google Docs and Pirate Pad. You can also use platforms for virtual meetings and webinars, such as Google Hangouts, Skype and Appear.in. Or Meetup for scheduling physical meetings open to a local community. Face-to-face contact helps to more quickly build trust between people, while virtual meetings make it easier for more people to participate. The most involved people, the most potential co-solvers if your idea is selected!

It is important to equally involve contributors regardless whether they are engaged online or offline. When leading the idea, you need to actively work with the contributors by acknowledging and building up on theirs contribution and supporting them to take an active stance in the ideation. Get creators and solvers motivated!

Refine your idea based on the gathered contributions & feedback

You can edit your idea as much and as often you want. Work on it until you and your collaborators are satisfied! You can do that from your profile in the “My Ideas” management section until you reach the deadline for ideation.

It is time for selecting one or a few ideas for further work...

Both you and other innovators have been working hard defining ideas to bring a solution to the challenge launched. Now, it is the time to select the best ones. Follow the voting of your idea and don’t hesitate to vote on other ideas as well.

If you are the challenge owner, it is time for you to select the best ideas. The members of the community can help you by assessing the ideas relevance and feasibility. Tap on their expertise and select the idea that will come true!
1.4 Prototyping

It's time to get into action! It is time develop and bring to life the idea that has been selected. To do so, bring your multidisciplinary team together and start working.

Set up your project

This is a very important moment. You, as Challenge Solver Leader, take the lead of the project!

As starter, find a nice, dynamic name for your project, define which information will be made available and establish the skills that imperative for your team. The SOCRATIC platform lets you re-use the content you developed for your idea, making this process quick and allowing you to focus on what is needed to start realizing the idea into a real-world solution. Once you have done that, create your project team. Remember that you need people that can design and develop, and also people who can test, create awareness, establish networks, and raise funds.

Contact those that supported your idea and helped you to refine it. The SOCRATIC platform helps you to build a team recruiting those who participated in the ideation step. They may be interested in further contributing to the realization.

Invite other people with relevant skills to complete your team. The SOCRATIC platform helps you to find social innovators based on theirs interests and skills. If you have some people in mind who are not registered yet, just bring them in!

And now... jump into action
The users and a “trial and error” attitude have to be in the centre of your thoughts through all the process. It is difficult to get your solution right on the first time, so develop first a few features and test them rapidly!

Build initial versions of your solution: prototypes. Prototypes are simpler than the solution you envision, but they let you test some aspects of the solution. The more focused the prototype is, the less features it has, the easiest it is to test it and to evaluate it. Reflect on what you learned from testing, and refine the prototype based on the feedback you get. You can also add a few new features. Then test again!

Set up your project

While developing the prototype, it is easy to become overwhelmed with all that could be built in the prototype and lose track of what you want to test in the iteration. Develop a test plan before you start the iteration cycle, describing what you want to find out and how you can test that. This will help you focus on building only the needed features in your prototype and effectively assessing its value. The SOCRATIC platform can help you formalize each iteration plan. You can also draft each iteration cycle using the tool Prototype Testing Plan:

http://dlytoolkit.org/tools/prototype-testing-plan/

Keep in mind the goals to be achieved in each cycle of the development of your solution, they should help you understand how to deliver value to the beneficiaries. Define and share tasks and test the value of your prototypes with beneficiaries!
Project management tools

Various tools can help you to plan and structure the iterative prototyping process:

**Gantt Charts** support scheduling the work.

**Tasks tracking** support breaking down the work, assign it to team members and following-up progress. For instance, look at Critical task list: [http://diytoolkit.org/tools/critical-tasks-list/](http://diytoolkit.org/tools/critical-tasks-list/)

---

**Involve the beneficiaries in co-design and testing**

The beneficiaries of the prototype you are working on, are the stakeholders that can help to develop the most useful solution to their problem. It is very important to involve them during the whole prototyping step, from designing it to testing. The testing approach for your prototype largely depends on its format. Usability tests and small pilots can help you uncover issues on the prototype early enough so that they can be fixed without incurring many extra resources.

**Usability Testing**


---

**Take into account the feedback from the beneficiaries in the development**

Re-work on your prototype towards the next established goal taking into account the insights given by the beneficiaries.

**Improvement Triggers**: Analyse which new directions to take your prototype to based on what you learned during the tests:

Encourage a supportive communication culture in your team

... An important clue of success

Let the team exchange ideas, reflections and feedback at any time! Make use of collaborative documentation tools, such as Google Docs and Pirate Pad. They are efficient for both virtual and collocated team. Internet tools such as Google Hangouts, Skype andAppear.in can support remote teams to have meetings and discussions with relatively low cost.

When you, you collaborators and the beneficiaries find the prototype good enough, it is time to bring it to the market! Go to the next step! Learn how to make your solution sustainable!
1.5 Sustaining

Congratulations!!! You have created a prototype for a solution that was found valuable by beneficiaries. Moving forward, your next challenge is to bring the solution to market! This requires the definition of a business strategy for ensuring uptake of the solution and revenue streams to fund your team. Even if you foresee a non-profit exploitation path, a viable economic model is necessary to ensure sustainability.

The sources of revenue should cover the costs of deploying, maintaining and further developing the solution as well as marketing it. You may need to establish an enterprise, or you may identify an organisation that is willing to acquire and bring forward your solution.

This may appear to be daunting, but by adopting the SOCRATIC innovation process, you have worked closely with the beneficiaries to create a solution and to provide evidence of the value of the solution. Along the way, you have identified key elements of a business model. You have established a network including various stakeholders. You are on the right track!

Refine your business model

By now, you have identified the end-users of your innovation and additional stakeholders. You also understand how your solution brings value to them. You should build upon this basis. Make your solution available for beneficiaries lives in order to collect experience about what is needed for keeping it operational and sustainable. The Business Model Canvas (see its description at the ideation step) is a great tool for that.

The Business Model Canvas helps you review the building blocks for sustaining your innovation:

The Value Map: the matching between the value proposition and the need of beneficiaries and stakeholders that can benefit and pay for your innovation. This should have been tested during the previous step.

The infrastructure: the activities and personnel needed to carry out your innovation, the physical resources and intellectual resources (e.g. patents or copyrights) required by the innovation, the partnerships and alliances that complement and support your innovation;

Customer reach-out: how do you reach out to the beneficiaries and paying stakeholders, how do you make your innovation available to them.

Finances: what costs do you have for maintaining and running your innovation and which revenue streams can you tap on.
The Business Model Canvas should be used both to analyse your current situation and to analyse the needed steps for ensuring the sustaining of your innovation. From such analysis, you can then write a business plan describing a viable plan for sustaining it. The plan helps you further analyse the feasibility of your innovation, identify the next steps of it and communicate it. Your business plan can support you further when presenting your project to investors.

There are different templates and guides for helping you draw your business plan and they will largely be based on the analysis of the building blocks of the business canvas. The DIY toolkit presents a worksheet


that helps you go through a high level planning and the description of an executive summary, while The Prince’s trust presents a template and financial tables for a more detailed business plan


Alternatively, your local government’s work or innovation offices, universities or start-up scenes may have similar resources and be able to provide additional guidance.
Financing your innovation

Funding is often described as the main challenge for sustaining a social innovation. It is common to start with internal funding (own contribution) and get extra margin on funds from grants and investors. It is important to use those paths for building a basis before further establishing direct revenue funds from paying stakeholders. Start-up and innovation competitions, crowdfunding platforms and public grants for innovation are good place for moving out of internal funding. Crowdfunding, in particular, can help also on market outreach as you try to retrieve funding directly from potential paying customers.

Is it time to create a company or organization?

It is difficult at this stage to proceed without establishing a legal entity, or creating an alliance with an organisation that is willing acquire to acquire the solution. Establishing a legal entity forms the legal ground for splitting ownership, protecting intellectual property and it may be required by investors or needed for being eligible for public grants. Therefore, in case you haven’t done yet, it may be a good idea to legally create your company or organization. Each country legislation is different, therefore, you should check the guidelines for your own scenario.

On top of a legal definition, you may want to set-up an organogram as to formally divide responsibilities in the team and identify recruiting needs. The transition to sustaining will likely require the team to grow as to cope with the new business activities (marketing, operation, etc). Such growth should be part of your strategy, and, if possible, done incrementally. Together with the growth of the team, you may want to build a team culture, to empower the team members and ensure that they have an environment where they can contribute.

Try to consider some mechanisms for team members to socialize, to take a break and get to know each other. That happens naturally in collocated offices at corridors, coffee machine and social outings. For a virtual team, you may want to use chatting platform such as Slack and Basecamp for supporting team members to socialize.
The business plan should have outlined a strategy on how to go forward. Now, it is the time for implementing: capturing finance, deploying the solution on real life, operating the solution, marketing it and reach out customers, expanding the team, etc. Implementing the strategy will most likely lead your team to establish a legal entity and embrace works tasks related to business sustainability such as accounting, operations, marketing, customer relationships, etc. Those changes will take some time. Some trial and error is expected before the team finds an effective organizational model and strategy. Therefore it is important to measure the process, understand the impact of decisions taken along the way and review the strategy based on their learning. The business plan is an evolving document that should be updated at the end of each assessment.
1.6 Scaling

Now that your team have formed a legal entity or became part of one; you achieved financial and operational sustainability; and your solution is thriving, bringing real impact to a group of beneficiaries in a sustainable way, it is time to consider scaling it up!

How can more people benefit from your innovation?

Defining which direction to scale

Look back at the initial challenge. What were the social goals? Can other people benefit from the solutions? A natural direction to scale is about expanding the solution to people with the same or similar needs, i.e. the same type of beneficiaries, in other communities. For instance, you can consider targeting other regions or countries. Another direction is about applying your solution, or parts of it, to other markets, i.e. addressing slightly different needs from a different type of beneficiaries.

Therefore, it is important to understand what parts of the solutions can be scaled. Is it the idea that you have developed and assessed, that should be replicated in similar ways otherwise? Is it the new technology that was developed? Is that the service provided based on that new technology? Is it a new process?

Different scaling strategies imply different ways and routes for implementing it. One option is organizational growth by establishing bases in other regions, diversifying development in other directions or creating divisions targeting other customer segments. Organizational growth requires a strenuous effort and a sound strategy particularly towards human resources and capital. Franchising and partnering are also options for scaling with fewer needs of organizational growth. They demand finding competent partners with the same shared vision and require funding.

What scaling direction looks more promising? What strategic alliances should be established for supporting the scaling strategy? How realistic are these alliances? Are you ready to grow further in other regions or markets?
Scaling Plan Tool

The scaling plan tool offers a worksheet template that guides reflection over key five areas you need to consider for scaling: 1) the knowledge and capacity of your organization; 2) the personnel and management structure needed for scaling; 3) evidences that your innovation model could be scaled to the new markets; 4) the existence of adequate resources for scaling; and 5) a business model supporting the scaling strategy. The key areas are to be discussed internally but also with beneficiaries, partners, donors and stakeholders in order to critically analyze the scaling strategy.

See http://diytoolkit.org/tools/scaling-plan-tool/

Plan, implement and measure

With the scaling strategy in place, you can start trailing the steps to gain scale. Your organization will change drastically during the process. Organizationally, you are likely to need more people, new departments, teams and the sufficient organizational structure to coordinate and help all of them function. Your outreach activities and network of partners, suppliers and consumers will grow.

You will need to adapt the KPIs you used to track your venture on the sustaining phase to be aligned with your scaling strategy. The KPIs should help you review the scaling strategy, measure its performance and social impact. They should serve as a reflection to review and possibly update your strategy.
1.7 Systemic Change

Social innovations achieve systemic change by affecting multiple systems within society, such as political and economic systems, but most of all, changing cultures and people’s mindset.

Systemic change is a gradual process with incremental step changes to the different systems that are part of the whole. How the process unfolds is hard and difficult to predict, therefore, there are no detailed recipes on how to achieve systemic change. There are a couple of things to keep in mind to help you reaching there:

Vision: Change starts with a vision. The vision is likely rooted in the initial challenge, and have driven you to scale your innovation. For reaching further, this vision must be shared and debated with different levels of society. It must be clear, well-formulated and of common interest for society for its incorporation.

Evidence: Your innovation has scaled by now, can you draw the social impact it brought? Evidences of its impact and effect are key for convincing and mobilizing supporters.

Network: Systemic change to be realized requires the involvement of multiple stakeholders from across society and consequently it is necessary first to communicate, but then to nature the relationships established. The underlying strategy should be to empower and facilitate ownership by all the relevant stakeholders, namely the beneficiaries.

Learn from previous experiences: Successful stories from other cases of social innovations reaching systemic change may help one in identifying the means for their own innovation to change society. A relevant source for successful stories is the Stanford Social Innovation Review, a magazine that aims at educating and inspiring the field of social innovation, and at disseminating the best in research- and practice-based knowledge. See https://ssir.org .
1.8 Resources

There are numerous resources online that can help you in one or other step towards achieving social innovation. Here there are a few of them.

DIY Toolkit (http://diytoolkit.org/): A compendium of practical tools to trigger and support social innovation.


Designkit (http://www.designkit.org): The site describes methods to apply when designing in an user-human-centered fashion.

Strategyzer (https://strategyzer.com/): A platform from the creator of the the Business Model Canvas, with articles supporting one to write a business plan.

KPI.org (http://kpi.org): Online resources for organizations for understanding Key Performance Indicators (KPIs) and developing performance measures. As many existing frameworks related to KPIs, focus is set on the business-related concerns, and the social dimension not addressed.


1.9 Bibliography


